

ESTABLISH A LASTING LEGACY

- Charitable organizations rely on your donations to fulfill their missions. As a *gift of gratitude* for your support, you have been given the opportunity to review or create your estate plan in a confidential legacy planning process.
- Through the Legacy Gift Planning Program, you will learn about a wide variety of charitable vehicles and estate planning tools — helping you consider the personal legacy you will leave to both loved ones and charities.
 - Incorporating charitable planned giving into your legacy plan.
 - Costs you nothing.
 - Minimizes taxes.
 - Enables you to leave a meaningful impact and lasting legacy.
- Ultimately, charitable estate planning allows you to make the *gift of a lifetime to a cause you believe in* — a gift that you might not be able to afford when you're alive.

The logo for Apex, featuring the word "Apex" in a white serif font with a blue arc above the letters "x" and "e".

Apex

OUR PROCESS



1
Receive a formal introduction to charitable gift planning.



2
Meet with a Legacy Planning Consultant to identify your personal and financial legacy goals.



3
Create a custom legacy plan that represents your values.



4
Find comfort in knowing the impact your legacy will have on generations to come.

HELPING PEOPLE MAXIMIZE THEIR LEGACY POTENTIAL

CONTACT US | 715.838.0368 | www.apexlegacyconsultants.com | admin@apexlegacyconsultants.com